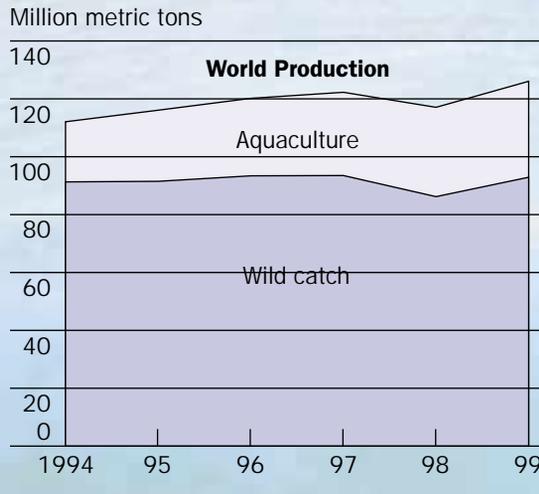


Waves of Opportunity for World and

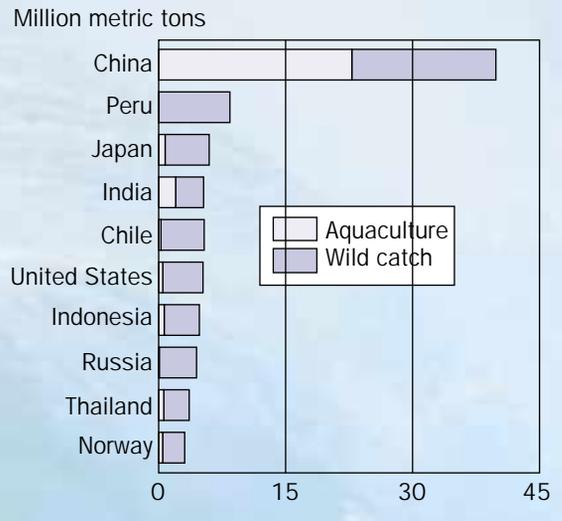
Commercial capture fisheries still dominate world production. However, aquaculture accounts for a growing share of world fisheries production, because many countries are faced with growing demand and over-fishing of oceans.

The most commonly raised fishery products worldwide are carp, oysters, clams, mussels, salmon, shrimp and tilapia. The United States primarily raises catfish, trout, crawfish, salmon, oysters and tilapia.

In World Fisheries Production, the Tide Is Turning From Wild Catch to Aquaculture



Top 10 Countries in Fisheries Production, 1999



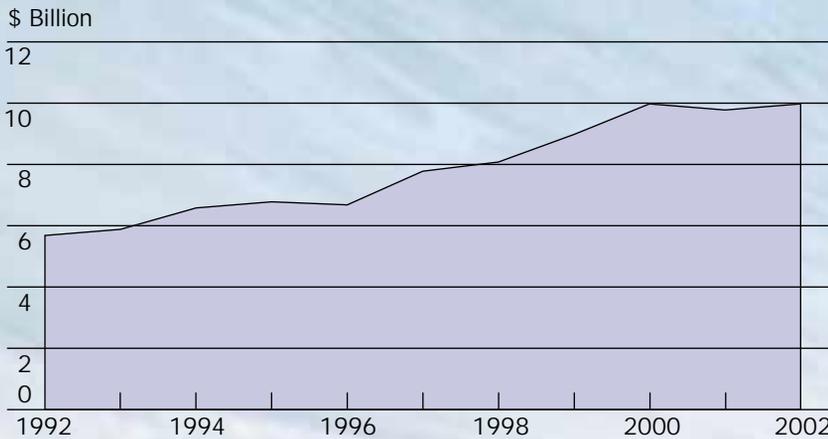
U.S. imports of fishery products are close to \$10 billion a year. The U.S. trade balance for fish and seafood products is just over \$3 in imports to every \$1 in exports.

Increased demand for shrimp has led to tremendous growth in imports. Domestic producers will face increased competition from products such as farmed salmon from Chile, shrimp from South Asia,

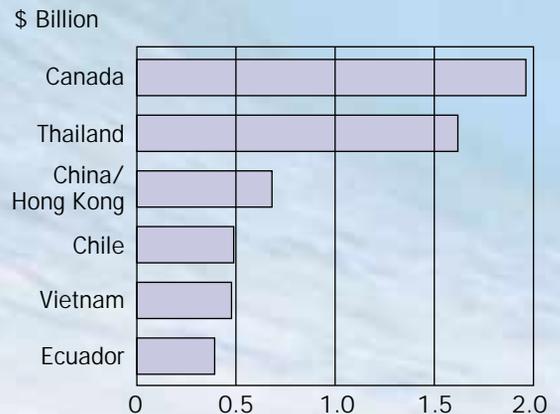
tilapia from Ecuador and new species still under commercial aquaculture development. Ask any producer in any country, and they'll likely reply that the competition for getting a product onto your plate is intense and coming from all directions.

We import products from all over the world; Canada and Thailand are our two largest suppliers.

U.S. Fish and Seafood Imports



Top Foreign Suppliers of U.S. Fish and Seafood Products in 2001



U.S. Fish and Seafood Trade

While commercial capture fishing continues to provide the bulk of U.S. fish and seafood production, aquaculture production has risen rapidly as scientific advances and investments in technology continue to fuel growth.

To remain competitive, the United States needs a growing and diversified aquaculture sector. U.S. aquaculture production has been increasing steadily for more than a decade.

Prospects for commercial landing growth, on the other hand, are limited. U.S. commercial landings have good and bad years, but in many other countries, you'd see a sharp overall decline in landings as past over-fishing has left fisheries managers no option but to limit harvests to rebuild stocks.

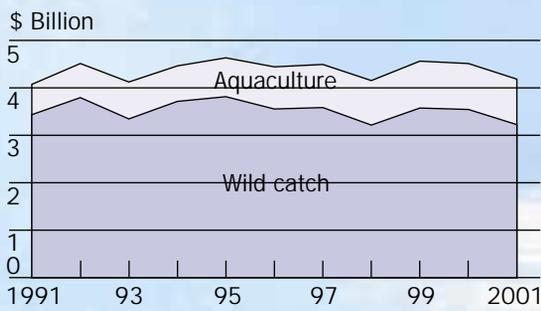
Compared with many other countries, U.S. fisheries management has been excellent, offering us greater export opportunities.

U.S. fish and seafood production extends to all four corners of the map, although Alaska is by far the largest producer and processor. California also has major processing operations, and Mississippi has a large catfish aquaculture industry.

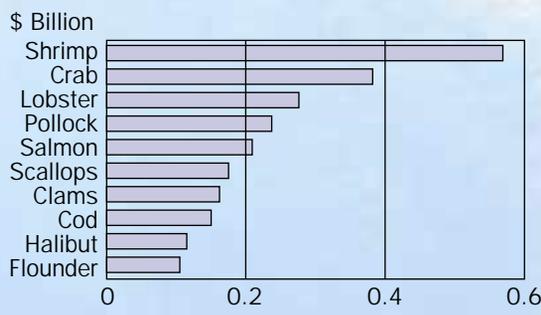
Total Value of U.S. Seafood Industry

Commercial:	\$3.1 Billion
Aquaculture:	\$1.0 Billion
Processing:	\$8.3 Billion
Total:	\$12.4 Billion

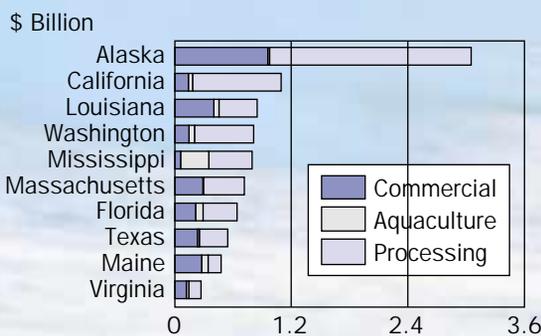
In U.S. Fisheries Production, the Tide Is Also Turning From Wild Catch to Aquaculture



U.S. Top 10 Varieties by Value of Commercial Landings in 2000



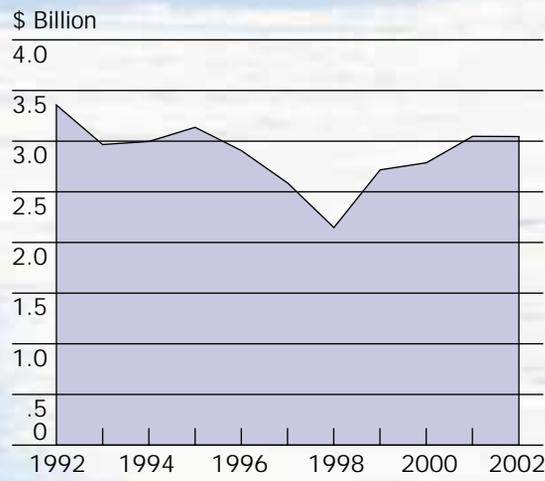
U.S. Top 10 States in Seafood Production Value in 2000



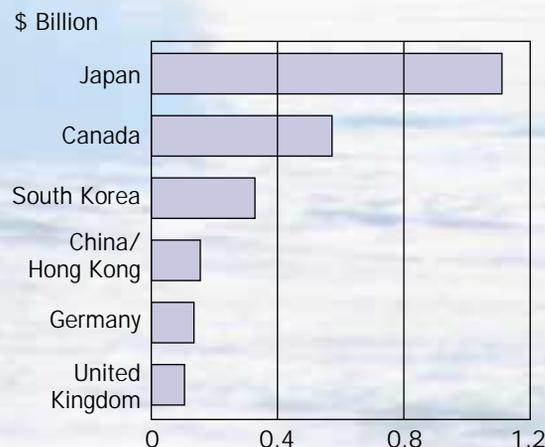
U.S. fish and seafood exports and market share have been climbing since 1998. U.S. exports reached \$3.1 billion in 2001, and U.S. market share that year was boosted by increased shipments of pollock roe to Japan and South Korea and pollock filets to Germany. In 2002, U.S. exports are estimated to have remained at \$3.1 billion.

U.S. sales opportunities abroad are limited by tariffs and fierce competition. In Japan, our largest market, we face stiff competition from farm-raised salmon. Previously, we held a 75-percent share of the salmon market; now we have just 40 percent.

U.S. Fish and Seafood Exports



Top Foreign Customers for U.S. Fish and Seafood Products in 2001



...Contacts

Gulf of Mexico: Texas, Louisiana, Mississippi, Alabama and Florida

3018 U.S. Highway 301 North
Suite 1000
Tampa, FL 33619
Tel.: (813) 228-2815
Fax: (813) 225-7015
Web site: www.gulfcouncil.org

Caribbean: U.S. Virgin Islands and Puerto Rico

268 Ave., Munoz Rivera, Suite 1108
San Juan, Puerto Rico 00918
Tel.: (787) 766-5926
Fax: (787) 766-6239
Web site: www.caribbeanfmc.com

Pacific: California, Oregon, Washington and Idaho

7700 NE Ambassador Place, Suite 200
Portland, OR 97220
Tel.: (503) 820-2280
Fax: (503) 820-2299
Web site: www.pcouncil.org

North Pacific: Alaska

605 W. 4th Ave., Suite 306
Anchorage, AK 99501
Tel.: (907) 271-2809
Fax: (907) 271-2817
Web site: www.fakr.noaa.gov/npfmc

Western Pacific: Hawaii, American Samoa, Guam and Northern Mariana Islands

1164 Bishop St., Suite 1400
Honolulu, HI 96813
Tel.: (808) 522-8220
Fax: (808) 522-8226
Web site: www.wpcouncil.org

Industry

Alaska Seafood Marketing Institute

promotes all Alaska-caught fishery products, focusing on salmon, crab and surimi.
311 N. Franklin St., Suite 200
Juneau, AK 99801
Tel.: (800) 478-2903/(907) 465-5560
Fax: (907) 465-5572
Web site: www.alaskaseafood.org

American Seafood Institute promotes all U.S.-caught fish and shellfish, excluding Alaska and catfish products.

212 Main St., Suite 3
Wakefield, RI 02879
Tel.: (401) 491-9017
Fax: (401) 491-9024

Maine Lobster Promotion Council promotes Maine lobster at home and abroad.

382 Harlow St.
Bangor, ME 04401
Tel.: (207) 947-2966
Fax: (207) 947-3191
Web site: www.maine lobster promo.com

The Catfish Institute promotes U.S. farm-raised catfish products.

1100 Highway 82 East
P.O. Box 924
Indianola, MS 38751
Tel: (662) 887-2988
Web site: www.thecatfishinstitute.com

Other Resources

Western United States Agricultural Trade Association promotes Pacific Ocean fish and seafood.

2500 Main St., Suite 110
Vancouver, WA 98660-2697
Tel.: 360-693-3373

Fax: 360-693-3464

Web site: www.wusata.org

Southern United States Agricultural Trade Association promotes fish and seafood from the Atlantic Ocean and Gulf of Mexico.

2 Canal St., Suite 2515
New Orleans, LA 70130
Tel.: (504) 568-5986
Fax: (504) 568-6010
Web site: www.susta.org

Mid-America International Agri-Trade Council also promotes fish products.

400 West Erie St., Suite 100
Chicago, IL 60610
Tel.: (312) 944-3030
Fax: (312) 944-1144
Web site: www.miatco.org

Aquaculture Network Information Center is a comprehensive site of aquaculture information, based at Purdue University.

Web site: www.aquanic.org

Seafood Network Information Center is a useful, comprehensive site of seafood information, based at the University of California at Davis.

Sea Grant Extension Program
Food Science and Technology
University of California
One Shields Ave.
Davis, CA 95616
Web site: www-seafood.ucdavis.edu

Thad Cochran National Warmwater Aquaculture Center is another source of links to many sites.

Web site: www.msstate.edu/dept/tcnwac/links ■